

Message Text

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ACTION AGR-08

INFO OCT-01 EUR-12 ISO-00 SP-02 AID-05 EB-07 NSC-05 RSC-01

CIEP-01 TRSE-00 SS-15 STR-01 OMB-01 CEA-01 CIAE-00

DODE-00 INR-07 NSAE-00 PA-01 USIA-06 PRS-01 /075 W

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R 201619Z JAN 75

FM AMEMBASSY BONN

TO SECSTATE WASHDC 7360

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DEPARTMENT PASS AGRICULTURE FOR GOODMAN & G&F DIV./FCA

E.O. 11652: N/A

TAGS: EAGR, GW

SUBJECT: FRG DURUM IMPORTS

BEGIN SUMMARY: ACCORDING TO ONE OF GERMANY'S LARGEST DURUM BUYERS, FRG IMPORTS OF DURUM IN 1974/75 WILL PROBABLY DROP BY ABOUT 25 PERCENT DUE TO HIGH WORLD PRICES. IMPORTS FROM THE U.S. AND FRANCE ARE EXPECTED TO INCREASE BUT NOT SUFFICIENTLY TO MAKE UP FOR THE DECLINE IN IMPORTS FROM CANADA. END SUMMARY.

1. DURUM BUYER FOR ONE OF GERMANY'S LARGEST MILLS INDICATED THAT DURUM IMPORTS INTO THE FRG COULD DECLINE BY MORE THAN 25 PERCENT DUE TO THE HIGH PRICES OF BOTH U.S. AND CANADIAN DURUM. THIS WOULD MEAN 190-200,000 TONS, A DROP OF ABOUT 60,000 TONS FROM THE 254,000 TONS IMPORTED IN 1973/74. THE ORIGINS EXPECTED TO PROVIDE THE REDUCED QUANTITIES ARE:

(A) FRANCE - ABOUT 40,000 TONS, UP FROM 25,000 TONS LAST YEAR DUE TO A BETTER QUALITY CROP.

(B) CANADA - ABOUT 100,000 TONS, DOWN MARKEDLY FROM 178,000 TONS A YEAR AGO, DUE TO A CROP THAT IS MUCH LOWER IN QUALITY.

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(C) U.S. - ABOUT 60,000 TONS, COMPARED TO 48,000 TONS IN

1973/74.

2. TOTAL SEMOLINA PRODUCTION IS NOT EXPECTED TO BE REDUCED BECAUSE THE BUYER ESTIMATES THAT THE PROPORTION OF DURUM TO OTHER WHEATS COULD FALL TO 70 PERCENT COMPARED TO ABOUT 95 PERCENT LAST YEAR.

3. MOST MILLS ARE CONSIDERED COVERED THROUGH TO ABOUT APRIL AND DEMAND AFTER THAT IS ESTIMATED AT ONLY 10-12,000 TONS PER MONTH THROUGH NEXT OCTOBER WHEN NEW CROP SUPPLIES SHOULD BE AVAILABLE.

4. HE DOES NOT ANTICIPATE ANY PARTICULAR PROBLEMS WITH SUPPLIES FROM CANADA OF HIGH QUALITY DURUM - 2'S, 3'S AND EXTRA 4'S -- BECAUSE THE CANADIAN WHEAT BOARD HAS INDICATED A WILLINGNESS TO HELP SUPPLY TRADITIONAL CUSTOMERS SUCH AS GERMANY.

5. FRG DURUM IMPORTS, AUGUST THROUGH NOVEMBER, DROPPED TO 60,000 TONS, SHARPLY DOWN FROM LAST YEAR'S 155,000 TONS AND BEYOND THE POINT OF RECOVERY TO LAST YEAR'S LEVEL PARTICULARLY IN THE FACE OF CURRENT AND FORESEEABLE WORLD PRICES. GERMANY HAS USUALLY IMPORTED ABOUT HALF OR MORE OF THEIR MARKETING YEAR NEEDS IN THE FIRST FOUR MONTHS - 1973/74: 64 PERCENT; EACH OF THE PREVIOUS THREE YEARS: 47-51 PERCENT.
HILLENBRAND

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Message Attributes

Automatic Decaptioning: X
Capture Date: 01 JAN 1994
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: WHEAT, IMPORTS, TRADE AGREEMENTS, PRICES
Control Number: n/a
Copy: SINGLE
Draft Date: 20 JAN 1975
Decaption Date: 01 JAN 1960
Decaption Note:
Disposition Action: RELEASED
Disposition Approved on Date:
Disposition Authority: MorefiRH
Disposition Case Number: n/a
Disposition Comment: 25 YEAR REVIEW
Disposition Date: 28 MAY 2004
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1975BONN00937
Document Source: CORE
Document Unique ID: 00
Drafter: n/a
Enclosure: n/a
Executive Order: N/A
Errors: N/A
Film Number: D750021-0694
From: BONN
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1975/newtext/t19750138/aaaabhmg.tel
Line Count: 88
Locator: TEXT ON-LINE, ON MICROFILM
Office: ACTION AGR
Original Classification: LIMITED OFFICIAL USE
Original Handling Restrictions: n/a
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 2
Previous Channel Indicators: n/a
Previous Classification: LIMITED OFFICIAL USE
Previous Handling Restrictions: n/a
Reference: n/a
Review Action: RELEASED, APPROVED
Review Authority: MorefiRH
Review Comment: n/a
Review Content Flags:
Review Date: 29 MAY 2003
Review Event:
Review Exemptions: n/a
Review History: RELEASED <29 MAY 2003 by SmithRJ>; APPROVED <30 MAY 2003 by MorefiRH>
Review Markings:

Margaret P. Grafeld
Declassified/Released
US Department of State
EO Systematic Review
05 JUL 2006

Review Media Identifier:
Review Referrals: n/a
Review Release Date: n/a
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
Secure: OPEN
Status: NATIVE
Subject: FRG DURUM IMPORTS BEGIN SUMMARY: ACCORDING TO ONE OF GERMANY'S LARGEST
TAGS: EAGR, GE
To: STATE
Type: TE
Markings: Margaret P. Grafeld Declassified/Released US Department of State EO Systematic Review 05 JUL 2006